INtax User Guide

November 2014

Indiana Department of Revenue

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Introduction

Welcome to INtax, Indiana's free online tool where your business can manage tax obligations for Indiana retail sales, withholding, out-of-state sales, prepaid sales, metered pump sales, tire fees, fuel taxes, wireless prepaid fees and type II gaming taxes. The tax forms supported in INtax include the following:

- ST-103
- ST-103MP
- ST-103P
- WH-1
- WH-3
- TF-103
- SF-900
- SF-401
- MR-360
- WPC-103
- TTG-103
- AVF-150
- FAB-103
- CIT-103

This user guide is designed to navigate you through the many options and the self-service adjustments that can be made in INtax. This guide will give you an inside look and basic knowledge of how to maintain your business accounts.

This guide assumes you have already registered your business with INtax. If you have not obtained a copy of the *INtax QuickStart Guide* and followed its detailed instructions, you can obtain a copy at any district office or on our website at www.intax.in.gov.

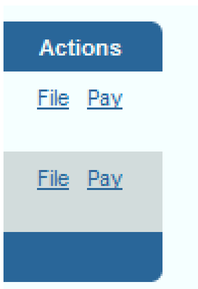
Before you begin, you'll need to have your username and password. Please make sure that you are able to log into INtax.

File a Return

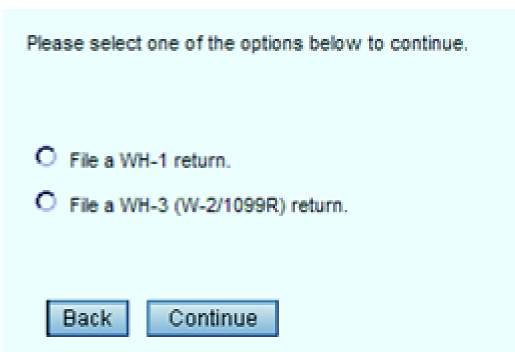
To file a return using INtax, follow these steps:

Step 1: On the Business Details page under the Actions column, select File for the tax type for which you want to submit a return.

*Remember to **File** first and then **Pay**.

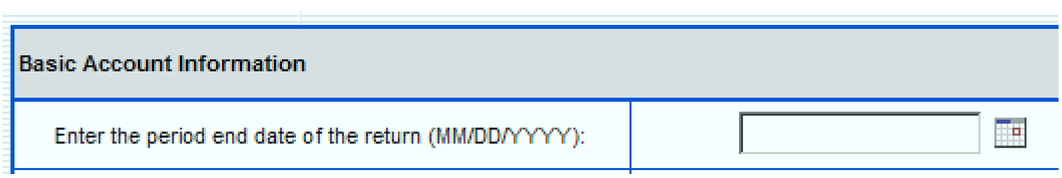


NOTE: For some tax accounts, the department will ask you for additional information to determine which form you want to file. For example:



Step 2: Enter the correct period end date.

**This will be the last day of the month/year that you have collected tax, not the due date of the return being filed.*



Step 3: Enter all the return information, and then click **Submit**.

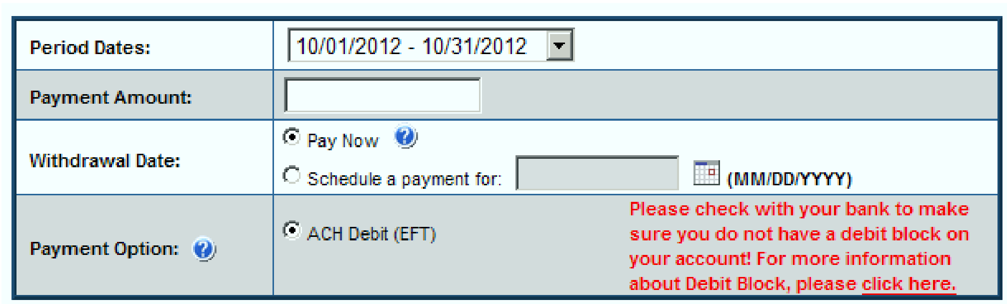
You will receive a return confirmation message after the return has been successfully submitted. If you are using INtax to make your payments, click the **Make a Payment** button. If you are not using INtax to make your payments, your transaction is complete and you can click any tab in the left navigation menu.

Make a Payment

Step 1: Click the **Pay** option from the tabs on the left, or click **Pay** under **Actions**.*

*Reminder: In most circumstances you will want to file the return prior to making the associated payment.

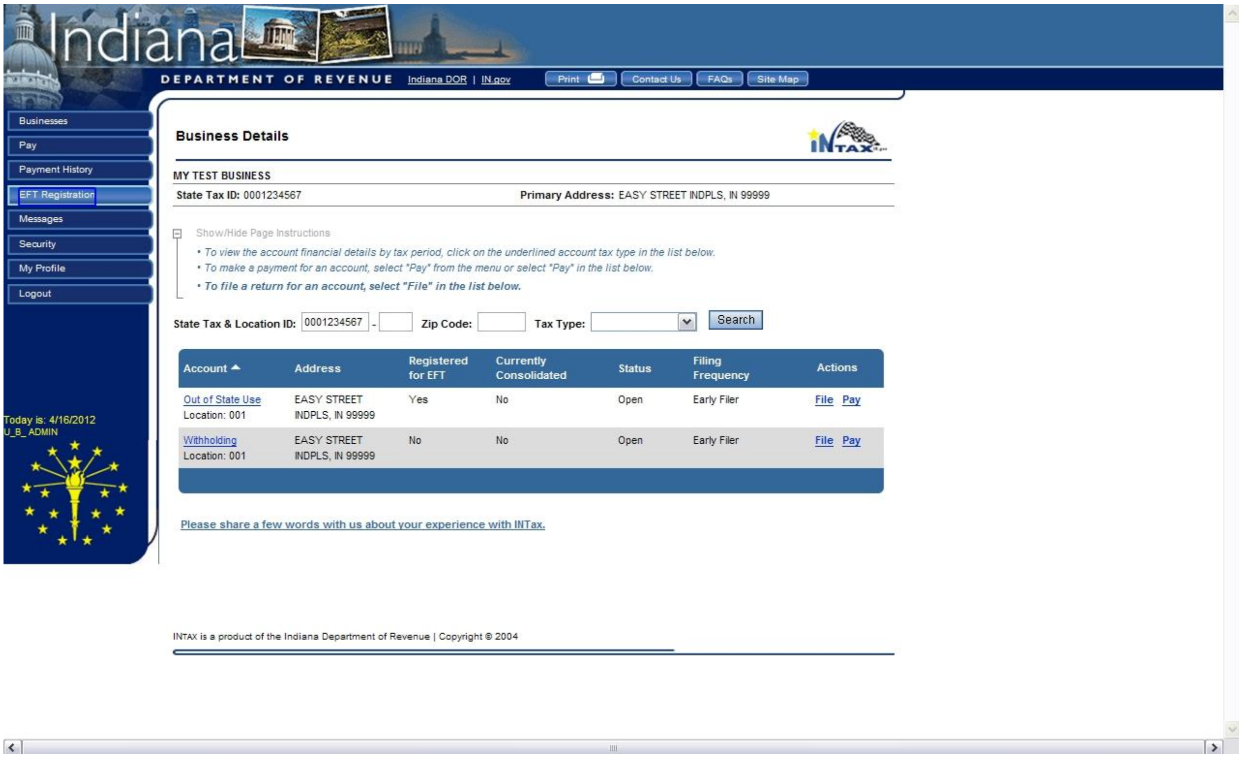
Step 2: From the drop down menu, select the period end date, and enter the payment information.



Step 3: Click **Submit**.

Step 4: Click **OK**. You will receive a payment confirmation message. If you have not already filed the return, click the File Return button from the payment confirmation screen. Depending on the tax type, either the form will populate the information for you or you will have to choose the form type.

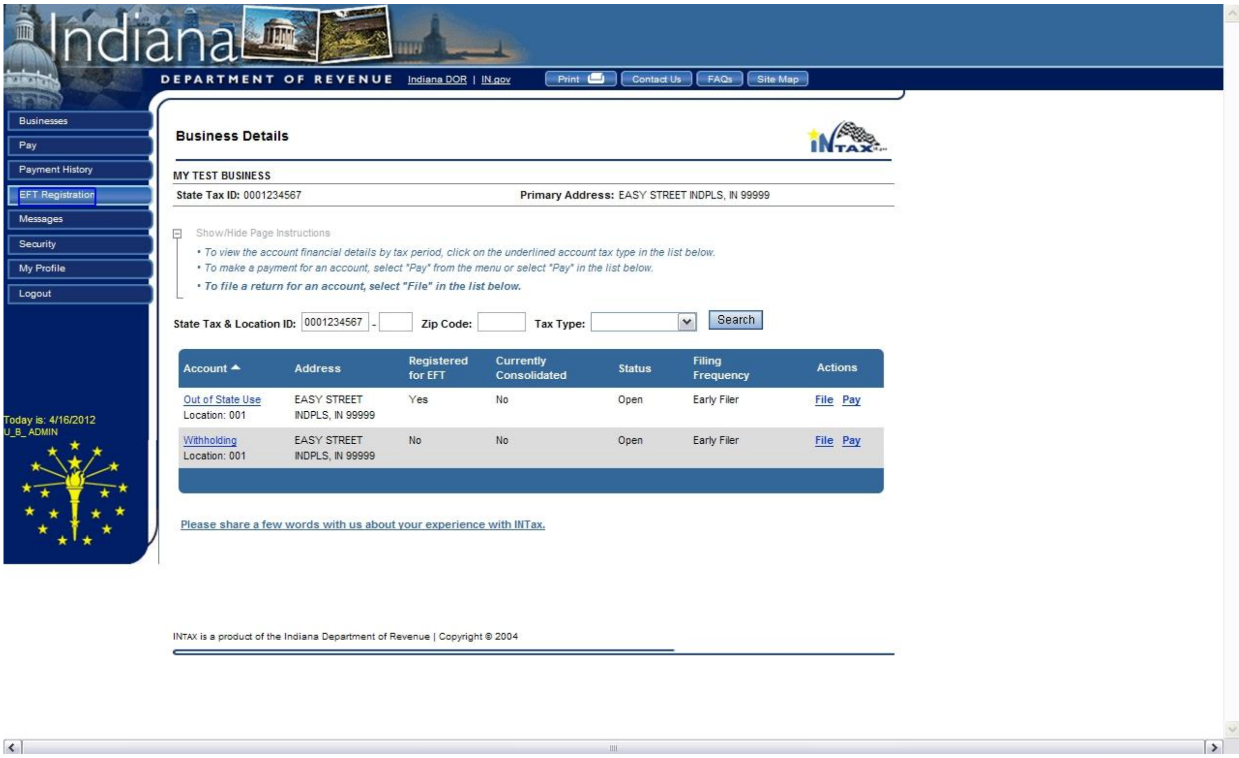
Electronic Funds Transfer



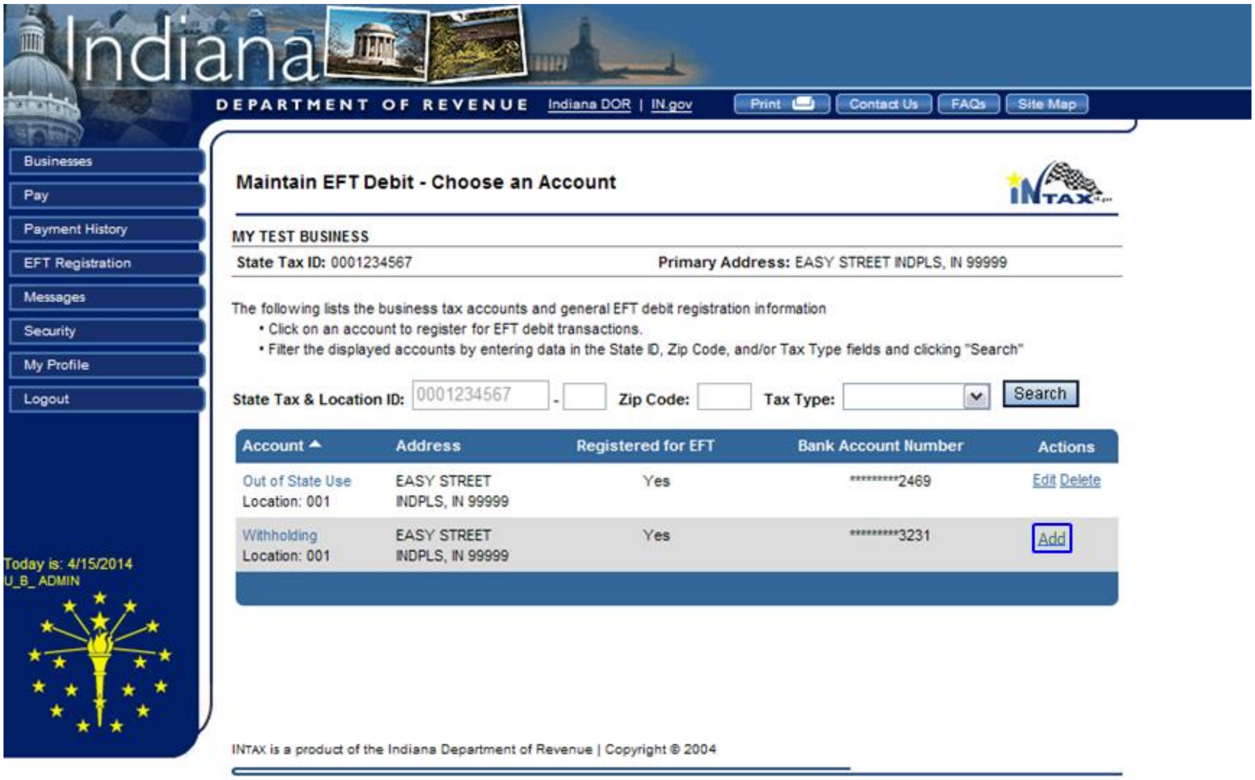
Electronic Funds Transfer (EFT) is a fast and secure way for businesses to transfer funds. Businesses using INtax to file returns are also required to register for and submit tax payments by EFT. The tax types that can be registered for EFT in INtax are listed below:

- Gasoline Distributors Tax (MFT)
- Prepaid 911 Enhancement Fee (WPC)
- Prepaid Sales Tax on Gasoline (PPD)
- Retail Sales and Use Tax (RST)
- Special Fuel Tax (SFT)
- State and County Withholding (WTH)
- Streamlined Sales Tax (SST)
- Tire Fee (TIF)
- Type II Gaming (TTG)
- Aviation Fuel Excise Tax (AVF)

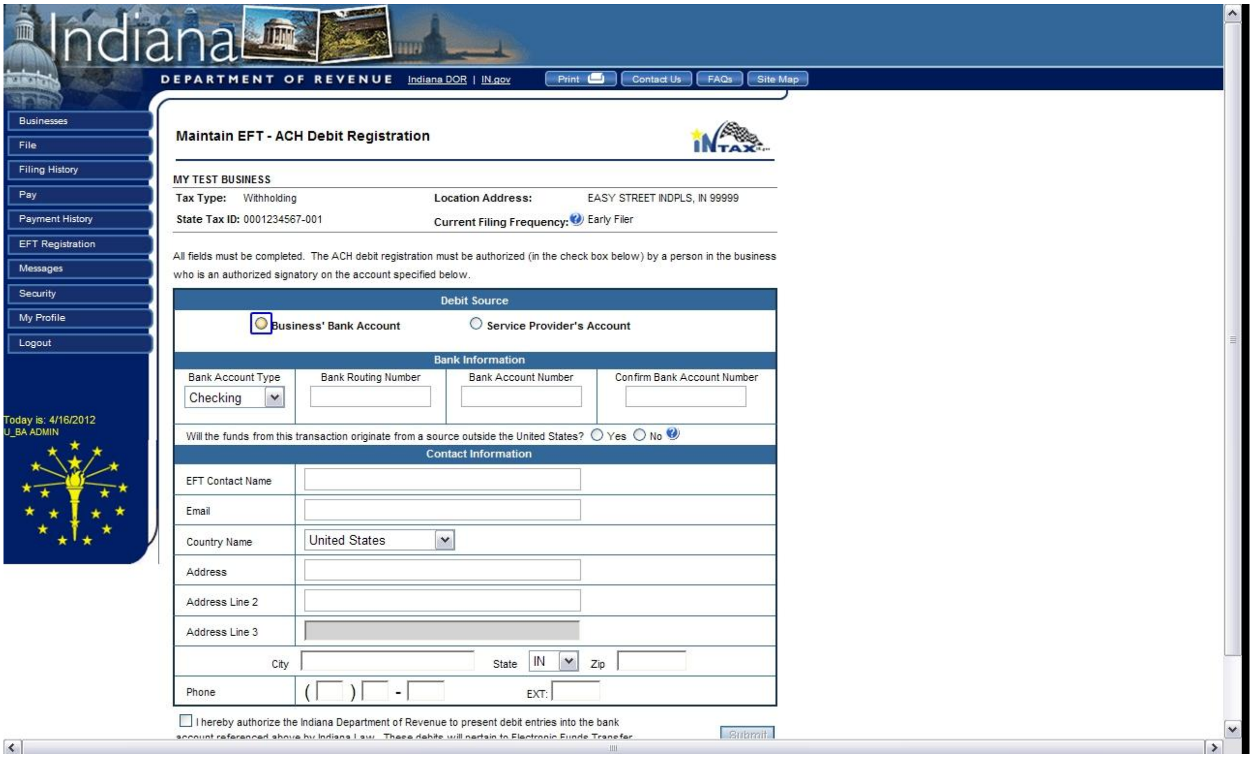
In the menu on the left side of the screen, click EFT Registration.



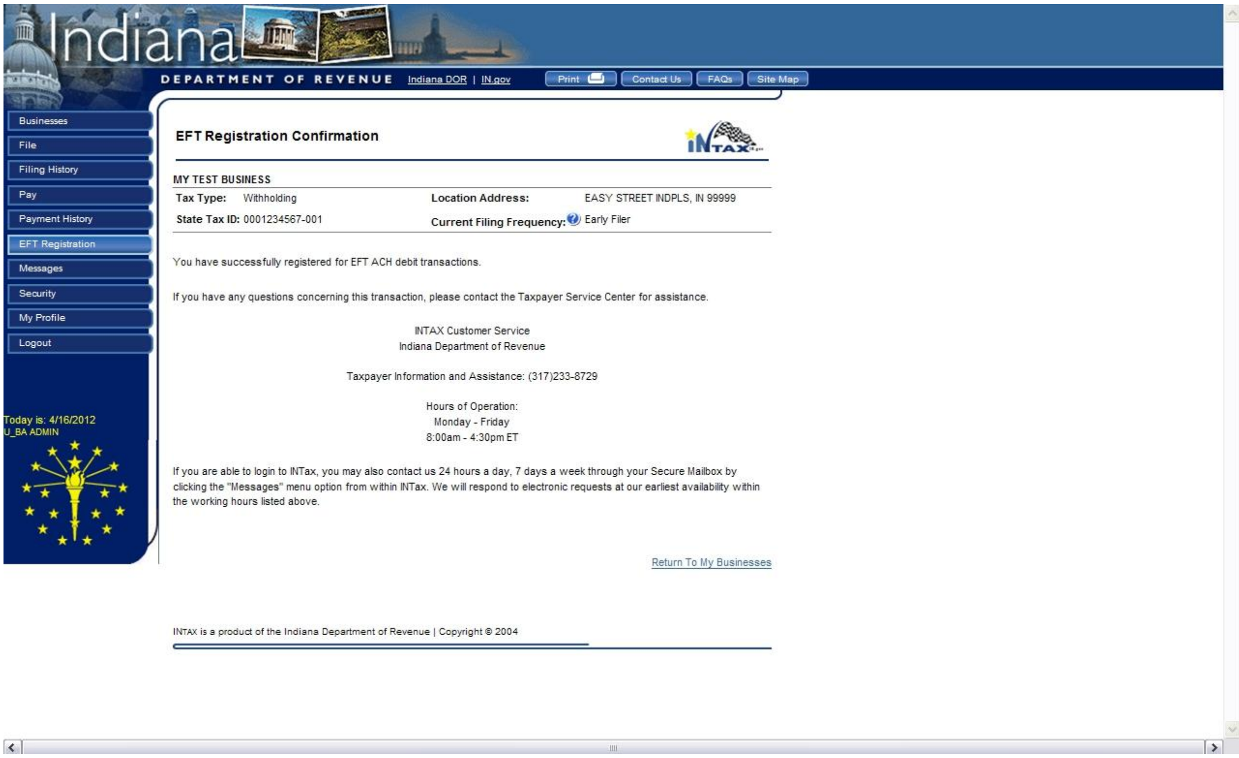
This screen lists your accounts and indicates whether they are registered for EFT. Select the account you want to register by clicking Add.



This screen asks for some specific information about your business. Fill in the required information, and click Submit to complete your EFT registration.

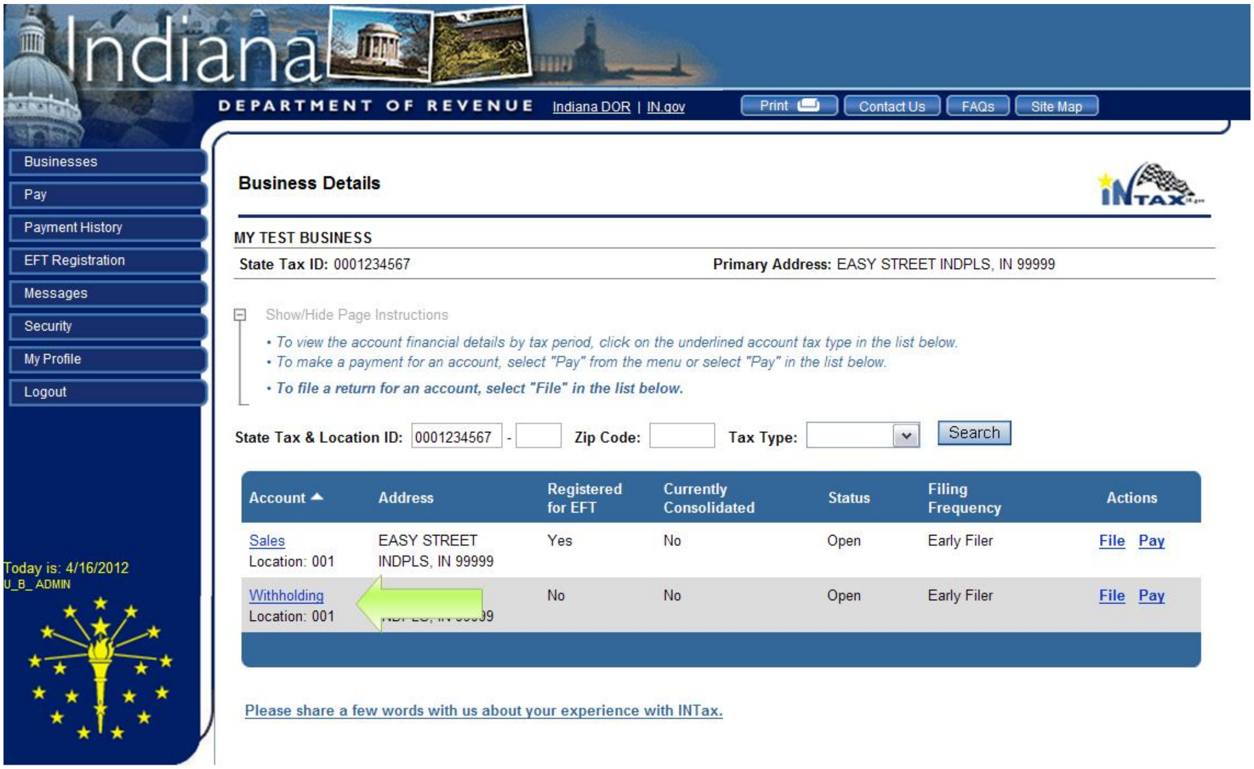


Congratulations! You have successfully completed your EFT registration.



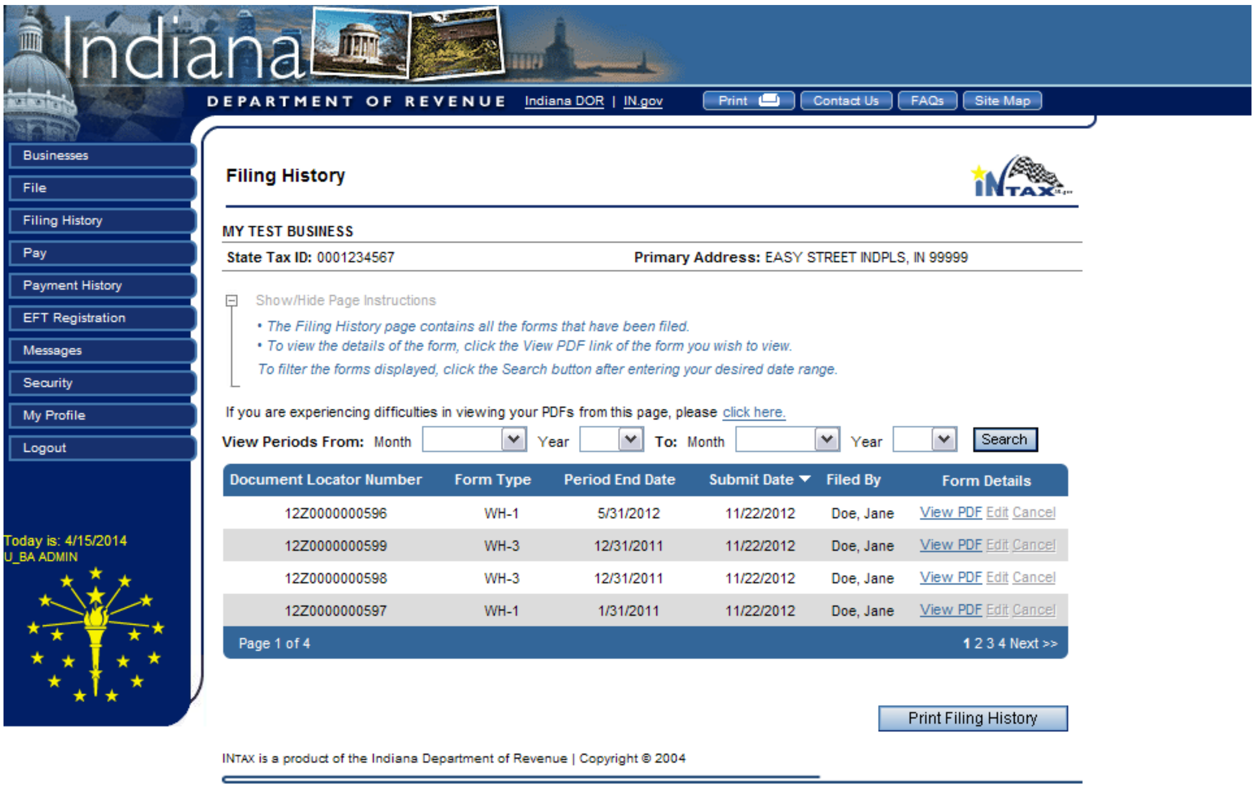
View Filing History

Step 1: When you are on the Business Details screen (pictured below), click the tax account you want to review.



Step 2: The Account Details screen will display, and the Filing History tab will appear on the left side of the screen. Click **Filing History**.

Step 3: The returns submitted for this tax type can now be sorted by the document locator number, form type, period end date, and/or submission date. You can also click View PDF Version to see PDF versions of the returns you have filed. This is also the screen where you can edit or cancel a return that has not yet been submitted for processing. If the edit/cancel options are disabled, the return has already been submitted for processing and cannot be edited or cancelled.



View Payment History

Step 1: On the Business Details screen, click the **Payment History** tab on the left side of the screen.

Step 2: You will be able to view all payments made by submission date, payment locator number, amount, and status.

You can edit Automated Clearing House (ACH) payments up to 3:45 p.m. (Eastern Time) the business day before the withdrawal date.

Note: You cannot edit or cancel credit card payments after they have been submitted.

Pay Underpaid Periods

Step 1: On the Business Details screen, click the **Pay** tab on the left side of the screen.

Step 2: A drop-down menu will display, giving you the option to either make a payment or pay your underpaid account balances. Click **Pay Underpaid Account Balances**.

Step 3: A list of the underpaid periods will display, along with their tax type and location, the period, and the period balance due. Type in the amount you want to pay for each underpaid period on the far right; then click **Continue**.

Step 4: The next screen shows a list of periods for which you have chosen to make a payment. It also shows the balance, the amount of the payment made, and the remaining balance due for each payment. At the bottom of this screen, click either **ACH Debit** or **Credit Card** to select your method of payment.

Step 5: Click Next.

Step 6: On the Payment Confirmation screen, you can review the payments one last time. Review them and then click the **Submit** button at the bottom of the screen.

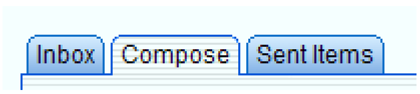
Step 7: The final Payment Confirmation screen displays. Print this page for your records. This will provide the Payment Locator Number (PLN), along with the account number and the remaining balance due.

Send and Receive Messages

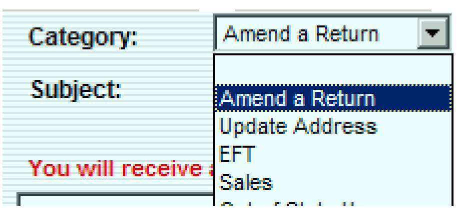
The Messages tab that appears on the left side of every screen in INtax enables you to send messages to the department and receive them from us. These messages occur in a secure environment so your information is safe. To send a message, follow these steps:

Step 1: From any screen, click **Messages**.

Step 2: Click the **Compose** tab.



Step 3: A screen that looks just like an email message appears. Select a **Category** from the drop down menu and type a subject for your message in the **Subject** box.



Step 4: Next, type your message in the body of the email. You can use the INtax Message Center to make nearly any request regarding your tax account.

Step 5: Click **Send**.

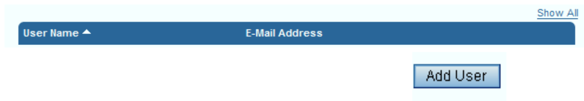
Step 6: The next screen confirms that your message was sent and gives you the subject, time, and date of your message. Please allow 2 to 3 business days for the department to respond.

Step 7: Once the department has responded to your message, an email will be sent notifying you that a message has been sent to your Secure Message Inbox. Click the **Inbox** tab (shown above) to view all the messages the department has sent you.

Security
Manage Users

From any page within your INtax account, you can access the Security tab on the left side of the screen. From the Security tab, you can add and delete users and manage their security rights to the account.

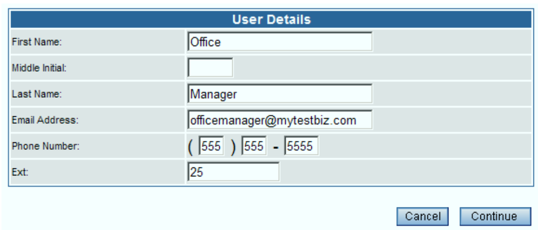
Add a User



Step 1: Click the **Security** tab on the left side of the screen.

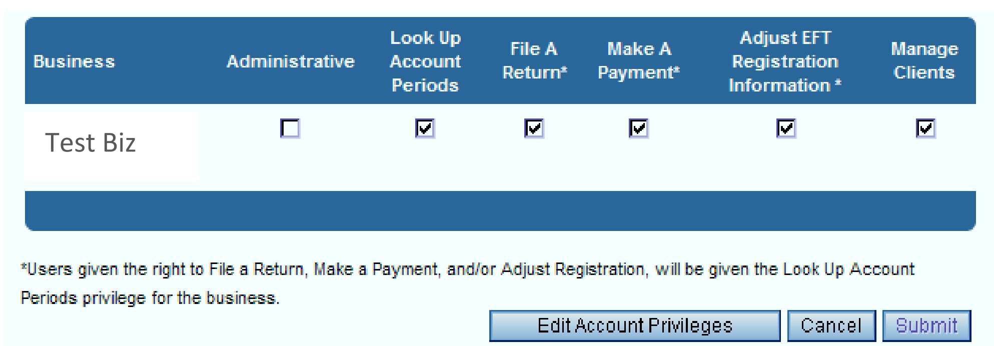
Step 2: Click the **Add User** button in the bottom-right corner of the screen.

Step 3: Enter the user's first name, last name, email address, and contact phone number.



Step 4: Click **Continue**.

Step 5: You will then be able to add specific security rights to that user by checking the boxes below the rights provided. If you check the Administrative box, the user will have rights to everything. Users given the right to File a Return, Make a Payment, and/or Adjust EFT Registration, will be given the Look Up Account Periods privilege for the business.



Step 6: Click **Submit**. The next screen confirms that the user has been added. INtax will then send the newly added user an email containing a link. The new user can click the link to go to a screen where he or she can select his or her own username and password.

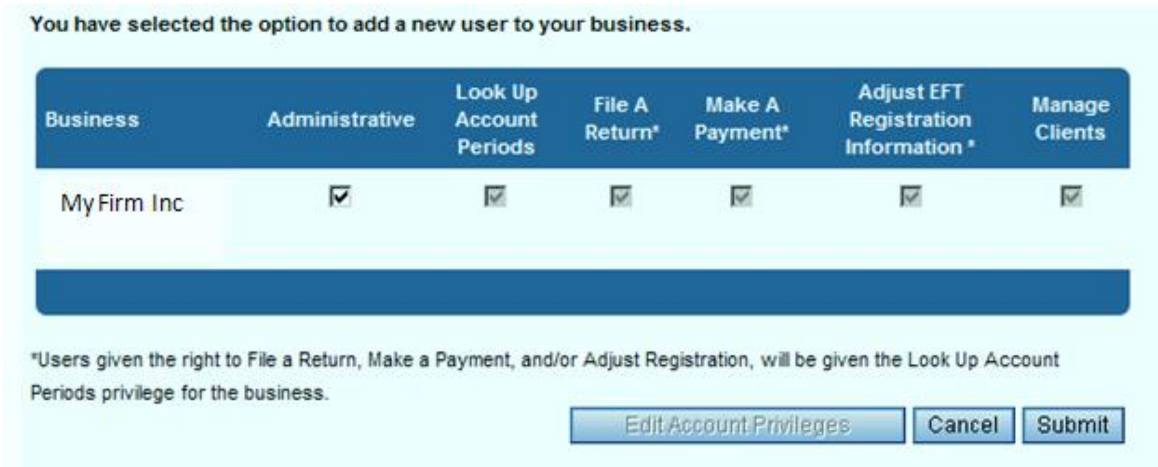
At any time, you can log in to INtax and adjust the rights to any of your users as long as you are set up as the administrator on the INtax account.

Adjust a User's Rights

Step 1: Click the **Security** tab on the left side of the screen.

Step 2: Click the **Username** of the person for whom you want to change rights.

Step 3: Select **User Privileges**. On this screen, you can change a user's rights or delete the user. Once the desired settings have been entered, click submit to complete the process.



Make Changes to Your Profile

The My Profile tab appears on the left side of every screen in INtax. Clicking this tab displays a drop-down menu with the following options: Add a Business to My Account, Add Wireless Prepaid, Update Contact Info, Change Password, and Change Username.

Add a Business

If you have multiple businesses with different taxpayer IDs, you can add more businesses to your INtax profile. To do so, follow these steps:

Step 1: Click **My Profile**.

Step 2: Click **Add a Business to My Account** from the drop-down menu.

Step 3: You must complete the registration process all over again by answering the questions and verifying the account information. After the business has been verified, you will receive an email notification and the business will then be visible within your original INtax profile.

Update Contact Info

To update your phone number, email address, or other contact information, follow these steps:

Step 1: Click **Update Contact Info** on the My Profile tab.

Step 2: Change the name, phone number, and email address associated with your INtax profile as desired. After you have made your changes, click save.

Change Password

You can change your INtax password by doing the following:

Step 1: Select **Change Password** from the drop-down menu on the My Profile tab.

Step 2: Enter your current password in the **Old Password** box.

Step 3: Enter your new password in the **New Password** box.

Step 4: Reenter the **New Password** to confirm that you typed it correctly.

Step 5: Click **Submit**. The next screen confirms the change.

Change Username

If you want to change your username, you can do so by following these steps:

Step 1: Click **Change Username** on the My Profile tab.

Step 2: Your current username will be displayed. Enter the new username you have chosen in the **New Username** box. Note: If you select a username that is already in use, you will be prompted to enter a different username.

Step 3: To confirm the change, enter your current password in the **Password** box.

Step 4: Click **Submit**. You will see a confirmation screen.

Additional Information

- **Filing Frequency Status May Have Changed:** The department reviews taxpayer accounts annually. Based on these reviews, your filing frequency status might change, which can affect your due dates. To avoid penalty and interest fees, please review the due dates by visiting www.in.gov/dor. You can also calculate your due date for each period while filing your returns.

- **Temporary Hotline:** For help registering for INtax, filing returns, or making payments, call our INtax hotline at (317)232-2337.

- **Closed Business:** If your business has closed, you must complete Form BC-100 and attach the required documentation. If you do not have the supporting documents requested, you can submit a notarized statement with Form BC-100. Form BC-100 is available at www.in.gov/dor/3489.htm.

- **Incorrect Information:** If the address listed is not correct, contact the department at (317)233-4015 or online at www.in.gov/dor/3392.htm.

- **No Tax Is Due:** A return must be filed by the taxpayer even when no tax is due, unless the Indiana tax account has been properly closed using Form BC-100. If no return is filed, an estimated return will be filed by the Department using the best information available (IC 6-8.1-10-3). A tax liability notice will be issued.

- **Due Date:** If the due date of your return falls on a weekend or legal holiday, your payment and return are due on the next legal business day.

- **Tutorials:** If you have any questions about using or registering for INtax, please refer to the department's video tutorials at www.in.gov/dor/4821.htm.

- **FAQs:** The FAQs button at the top of every screen in INtax provides answers to common questions. If you don't find the information you need and still have a question, you can click the Message tab in your INtax account and email the department your questions.

Notes